

Equipment Module

The Equipment Module is used to store information about your organization's assets. The historical data of the equipment provides an ongoing mechanism for monitoring equipment costs. This Chapter describes how to use the Web Work, Equipment module.

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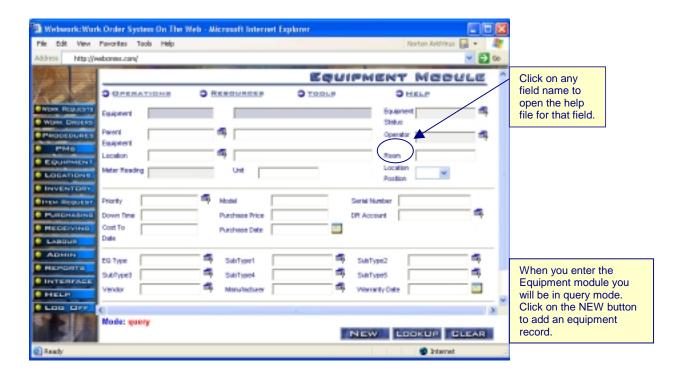
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1.1 Overview of the Equipment Module

The Equipment module is used to store information about a company's assets. All pertinent information relating to a piece of equipment can be stored within this module. For example: Location, Operator, Model, Serial Number, Purchase Date and Price, Warranty Information and Meter Readings.

Click on the EQUIPMENT button on the left hand side of the screen to access the Equipment module.

When you enter the Equipment module you will be in Query mode as shown in the screen below:



The OPERATIONS DEFERATIONS, RESOURCES DESCRIPTIONS, TOOLS DEPERATIONS and HELP drop down menus contain the various features available in the Equipment module.



Web Work includes "help files" for all field names. To access these help files, click on the field name. A popup window will open displaying help for the field selected.

2.1 Creating New Equipment Records

Create Equipment records for all equipment. When a work order is created, the equipment is added to the work order to provide the employee or contractor of the equipment particulars. When entering Equipment records, set them up in a hierarchal manner.

2.1.1. What are Parent/Child Equipment Records

When entering equipment records, always enter parent equipment records first (the main piece of equipment) and then enter the child equipment records (a part of the main equipment). By doing so you can attach the child equipment to the already existing parent equipment record.

For example:

A vehicle may be set up as the parent equipment record. Then the motor can be set up as the child equipment, linked to the parent equipment (the vehicle.)



When parent equipment is added to an equipment record, the Parent Description, Contact and Contact Description and DR Account fields will automatically be filled in with the information that was entered on the Parent equipment record.

2.1.2. Creating Equipment Records

To create a new Equipment Record:

- Click on the EQUIPMENT button access the Equipment module.
- Click on the Server menu at the top of the Equipment Screen to display the drop down menu.
- Select "New Equipment or Equipment Auto Number " from the menu. The mode you are in is displayed at the bottom of the screen. (ie: query mode, new mode)
- Enter information into the fields displayed on the screen.

Note: Equipment ID and Description are the only required fields all others are optional fields.

 Click on the SAVE button at the bottom right hand side of the screen to save the Equipment Record.



The F12 key is a hot key and can be used to SAVE a record instead of clicking on the SAVE button.

3.1 Duplicating Equipment Records

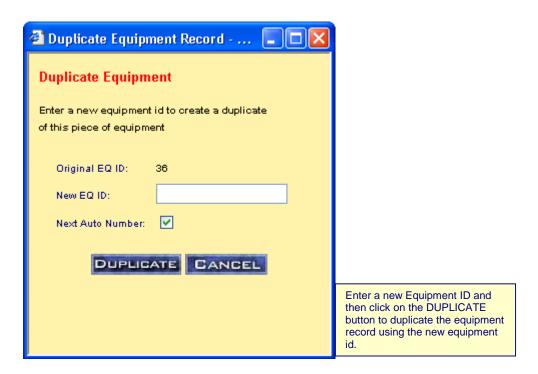
Instead of having to retype similar information for similar pieces of equipment you can create a duplicate equipment record and then edit the information for the new piece of equipment.

To Duplicate an Equipment Record:

- The equipment record you wish to duplicate must be displayed on the screen. You can
 duplicate the equipment record after you have created and saved the original equipment
 record or if the equipment record has already been saved, do a query to locate and open the
 applicable equipment record (see Equipment Queries).
- Click on the Department menu and select Duplicate Equipment from the drop down menu.



The following screen will open:



- Enter a New Equipment ID or click on the checkbox beside Next Auto-Number to have the Web Work system assign the next available auto-number to the equipment record.
- Click on the DUPLICATE button
- The new record will open in Edit mode.
- Edit the duplicate equipment record as required and then click on the SAVE button
 to save the new equipment record.

3.1.1. <u>Duplicating Equipment Records – Example 1</u>

Instead of having to retype similar equipment records, you can create a duplicate equipment record and then edit the information as required for the new equipment records.

For example if you have 12 vehicles that are all similar, instead of having to create 12 equipment records, you can create one record and duplicate it 11 times.

When you duplicate a record, all that you have to change is the equipment code. You can use autonumbering to do this or select your own codes for the duplicate records. Duplicate records can be edited as required.

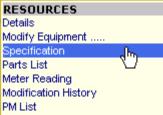
4.1 Equipment Specifications

Additional information about a piece of equipment can be added using the Equipment Specifications feature. You can later do searches on equipment specifications to find equipment records with similar attributes.

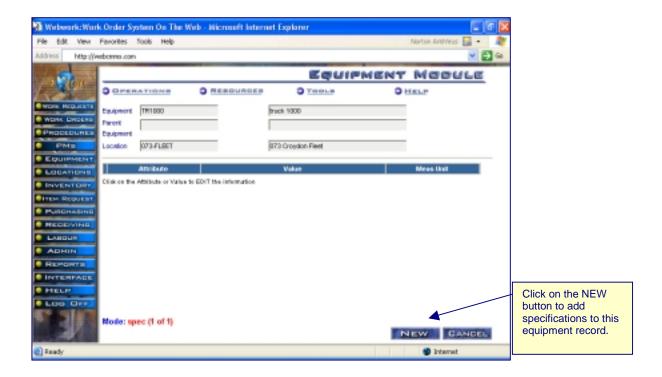
4.1.1. Adding Equipment Specifications

To add specifications to an equipment record:

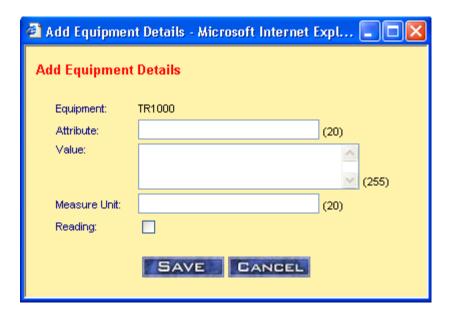
- Click on the EQUIPMENT button on the left hand side of the screen to access the Equipment module.
- Open an Equipment Record.
- Click on the RESQUECES menu at the top of the screen and select Specifications from the drop down menu.



The Equipment record will open in Spec mode as shown in the example below.



Click on the NEW Button at the bottom of the screen to open the Add Equipment Details screen as shown below:



The Equipment ID field will automatically be filled in.

- Enter the name of the attribute. IE: color, size, speed etc.
- Enter the Value associated with the attribute. IE: number of pounds, speed, name of color etc.
- Enter the Measure unit. IE: Tons, kgs
- Click in the Reading checkbox if readings are collected for this piece of equipment.
- Click on the SAVE button SAVE to save this Specification and return to the specifications screen for this piece of Equipment.

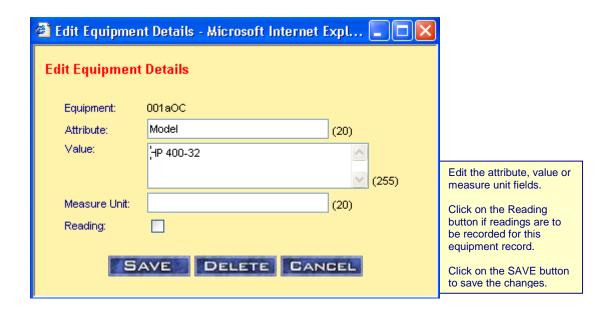
4.1.2. Editing Equipment Details

To edit equipment details:

- Click on the EQUIPMENT button access the Equipment module.
- · Open an Equipment Record.
- Click on the RESQUECES menu at the top of the screen and select Specifications from the drop down menu.



- The Equipment record will open in Spec mode.
- Click on any of the Attributes or Values in the Specifications table to open the Edit Specifications window as shown below:



OPERATIONS

New Equipment Equipment Query

Duplicate Equipment .. Delete Equipment Print Selected Equipment

New Equipment (Auto Number)

- Edit the Attribute, Value or Measure Unit fields.
- Click on the Readings button if readings are to be recorded for this equipment record.
- Click on the SAVE button to save the updated Equipment Details and return to the specifications screen for this piece of Equipment.

4.1.3. Searching Specifications

The search specifications feature in Web Work permits you to query the Web Work database to locate equipment with similar specifications.

To locate equipment containing specific specifications:

- EQUIPMENT Click on the EQUIPMENT button on the left hand side of the screen to access the Equipment module.
- Open an Equipment Record.
- Click on the **DEFERATIONS** menu at the top of the screen and select Search Specifications from the drop down menu.
- The following screen will open:

Search



- Click on the arrow beside the Attribute field to select an attribute to search on.
- Enter the selection criteria into the Contains Text field.

Cancel

Click on the SEARCH button. A table showing all equipment records containing the selected specification will be displayed.

Click on the down arrow beside attribute to select an attribute to search on.

 Click on the check box beside the records you wish to retrieve or on SELECT ALL to retrieve all the records containing the specified criteria.

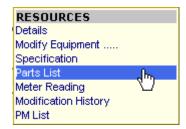
5.1 Using Equipment Parts Lists

The Equipment Parts List function permits you to list parts associated with a piece of equipment. This is Especially useful to trades who will require this information when replacing part of a piece of equipment. Rather than having to research the correct part attributes, the information is readily available to them.

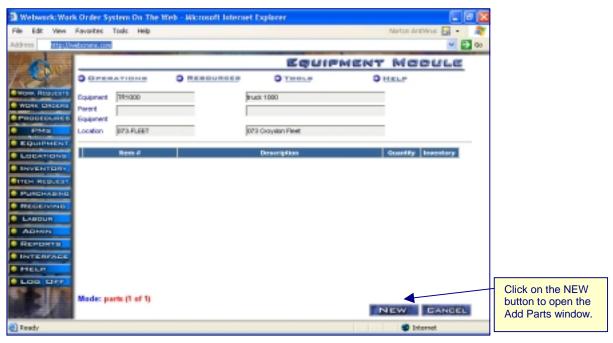
5.1.1. Adding parts to an Equipment Record

To add parts to a piece of equipment:

- Click on the EQUIPMENT button access the Equipment module.
- · Open an Equipment Record.
- Click on the EEEDURGEE menu at the top of the screen and select Parts List from the drop down menu.

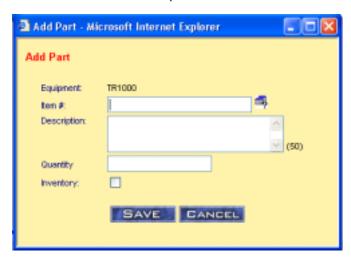


A screen similar to the one shown below will open.



 The Equipment ID, Parent ID and Location fields applicable to this piece of equipment will fill in automatically.

- Listed below the Equipment, Parent and Location fields is a table, which lists components, associated with this piece of equipment, a description of the component and whether or not the part is in Inventory.
- Click on the NEW button to open the Add Parts window as shown below:



- Enter an item #, description and quantity into the applicable fields. If this item is in Inventory the inventory checkbox will be ticked automatically.

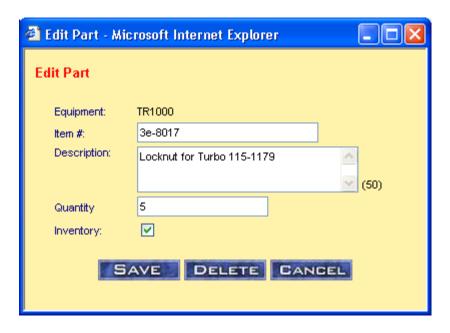
5.1.2. Editing Parts Lists

To edit parts associated with a piece of equipment:

- Click on the EQUIPMENT button access the Equipment module.
- · Open an Equipment Record.
- Click on the RESQUECES menu at the top of the screen and select Parts List from the drop down menu.
- The equipment record will open in Parts mode.



 Click on the Item Number or Description in the Parts table to open the Edit Part screen as shown below:



- The Equipment, Item Number and Inventory fields are read-only fields. Edit the description and quantity fields as required.
- Click on the SAVE button to save the changes and return to the equipment record in Parts mode.

5.1.3. Deleting Parts

To delete parts associated with a piece of equipment:

Click on the EQUIPMENT button access the Equipment module.

RESOURCES Details

Specification

Meter Reading Modification History

PM List

Modify Equipment .

- · Open an Equipment Record.
- Click on the RESQUECES menu at the top of the screen and select Parts List from the drop down menu.
- The equipment record will open in Parts mode.
- Click on the Item Number or Description in the Parts table to open the Edit Part screen.
- Click on the DELETE button to delete the parts and return to the equipment record in parts mode.





When you are in Parts mode and want to return to the main screen of the equipment record – click on the RESOURCES menu and select Details from the drop down menu.

6.1 Meter Readings

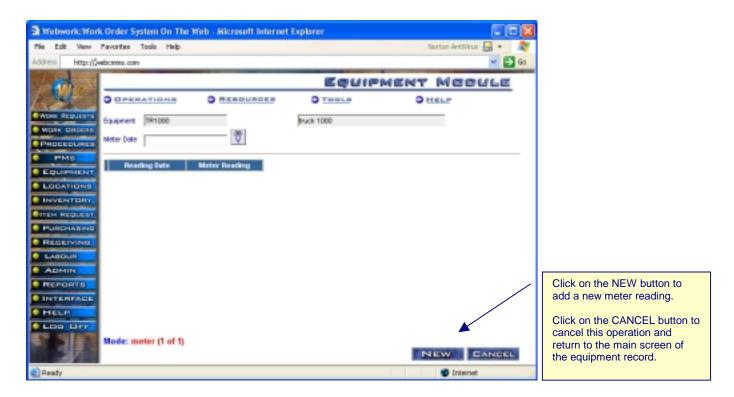
Use the meter readings function to keep track of meter readings for a piece of equipment.

To add a meter reading:

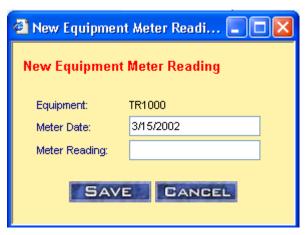
- Click on the EQUIPMENT button on the left hand side of the screen to access the Equipment module.
- · Open an Equipment Record.
- Click on the RESQUECES menu at the top of the screen and select Meter Reading from the drop down menu.

RESOURCES
Details
Modify Equipment
Specification
Parts List
Meter Reading
Modification History
PM List

The following screen will open:



 Click on the NEW button at the bottom of the screen to open the New Equipment Meter Reading window as shown below:



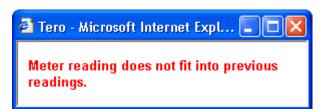
The Equipment ID and Meter Date will fill in automatically.

Note: to change the default date just delete it and enter the applicable date into the Meter Date field.

- Enter the Meter Reading.
- Click on the SAVE button SAVE to save the meter reading and return to the Meter Reading main screen. The meter reading you just entered will appear in the table on this screen.
- Click on the NEW button to add additional meter readings.
- To exit the meter reading screen and return to the main screen of the equipment record, click on the CANCEL button or click on the main screen of the equipment record, click on the CANCEL button or click on the main screen of the equipment record, click on the CANCEL button or click on the main screen of the equipment record, click on the CANCEL button or click on the main screen of the equipment record, click on the CANCEL button or click on the main screen of the equipment record, click on the CANCEL button or click on the main screen of the equipment record, click on the CANCEL button or click on the main screen of the equipment record, click on the CANCEL button or click on the main screen of the equipment record, click on the main screen of the equipment record, click on the main screen of the equipment record, click on the main screen of the equipment record, click on the main screen or click or click on the main screen or click or



Meter readings can be added for a date earlier than the current date, but not later than the current date. Note when entering meter readings the reading must fall into sequence or a message box such as the one shown below will open stating the reading does not fit into the previous readings.



7.1 Modifying Equipment Records

7.1.1. To Modify an Equipment Record

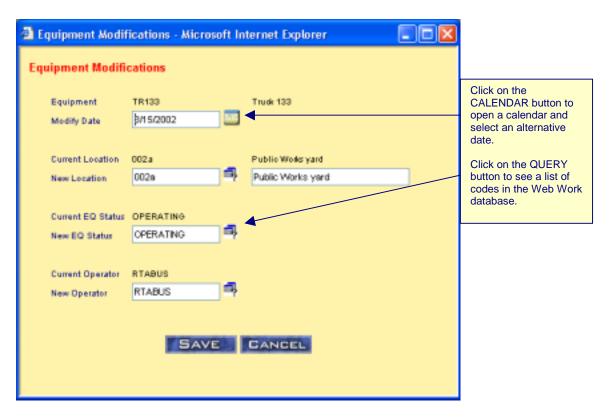
The modify equipment feature can be used to change the location of a piece of equipment, the operator of a piece of equipment or the status of a piece of equipment.

To modify the equipment:

- Click on the EQUIPMENT button on the left hand side of the screen to access the Equipment module.
- Open an Equipment Record.
- Click on the RESQUECES menu at the top of the screen and select Modify Equipment from the drop down menu.



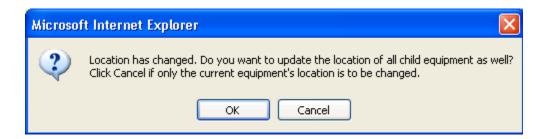
The following screen will open:



- Enter a new Modification date if applicable or click on the CALENDAR button and select the date from the calendar.
- Enter the new Location into the New Location field or click on the QUERY button ** to select the
- location from the Web Work database. The location description will fill in automatically.
- Enter a new EQ Status if applicable into the New EQ Status field or click on the QUERY button to select one from the Web Work database.
- Enter a new Operator into the New Operator field or click on the QUERY button operator from the Web Work database.
- Click on the SAVE button SAVE. The Equipment record will be updated with the new information.



If the equipment has any child equipment associated with it a message box like the one shown below will be displayed. Click on the *OK* button to update the child equipment, click on the *CANCEL* button if only the current equipment's location is to be changed.



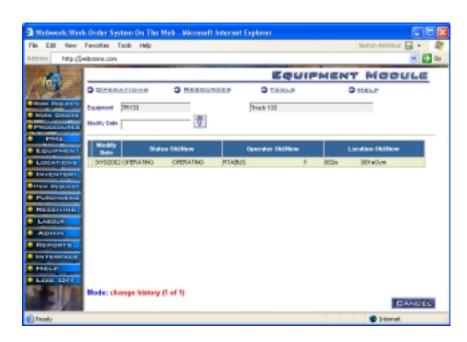
7.1.2. Equipment – Modification History

The Equipment Modification History feature is used to view the modification history for an equipment record.

To view Modification History:

- Click on the EQUIPMENT button access the Equipment module.
- · Open an Equipment Record.
- Click on the RESQUECES menu at the top of the screen and select Modification History from the drop down menu.





A screen similar to the one shown below will open:

The equipment modification feature shows all modifications, which have been done, to the Status, Operator or Location of an equipment record.

8.1 Deleting Equipment Records

Caution should always be used when deleting any records from the Web Work database. However, there may be times when this is necessary. An example would be when a n equipment record was entered in error. Since you cannot edit an equipment code, you would have to delete the record and begin again.

To delete an Equipment record:

- Click on the EQUIPMENT button on the left hand side of the screen to access the Equipment module.
- Click on the Comment Screen to display the drop down menu.



Select Delete Equipment from the drop down menu.

A message box such as the one shown below will open:



- By deleting an equipment record, all PMs associated with the equipment record will be deleted and all child equipment will be deleted.
- Click on the OK button to delete the record or the CANCEL button to cancel the operation.



It is not advisable to delete equipment records that have been assigned to a work order. When you delete equipment records you delete all PMs associated with the equipment record and all child equipment will not reference the deleted equipment record as its parent.

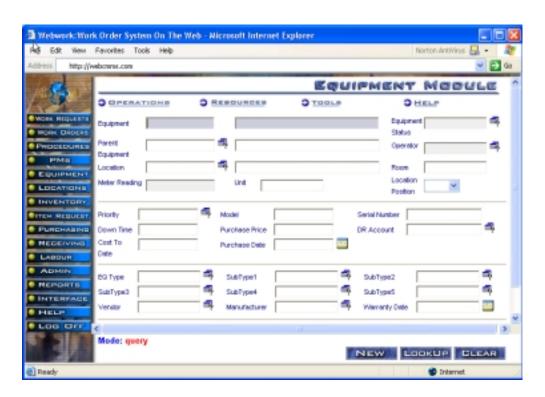
9.1 Performing Equipment Record Queries

Find the equipment records you need quickly and easily using Web Work's Query by Example feature. For more information on Query by Example see the System Overview chapter of this manual.

9.1.1. To perform an Equipment Query

- Click on the EQUIPMENT button on the left hand side of the screen to access the Equipment module.
- · Open an Equipment Record.
- Click on the Common menu at the top of the screen and select Equipment Query from the drop down menu.





The Equipment screen will open in Query mode as shown below:

- Enter selection criteria into any of the fields. (see Example 1 below)
- Click on the LOOKUP button to display a list of records matching the criteria you specified.
- To open any of these Equipment records click the selection box on the right hand side of the applicable Equipment record (s) in the table, and then click on the RETRIEVE button at the bottom of the screen. The Equipment record will appear on the screen. If you selected multiple Equipment records, when you retrieve them an arrow will appear on the bottom left hand side of the screen. Click on this arrow to move from one equipment record to the next.



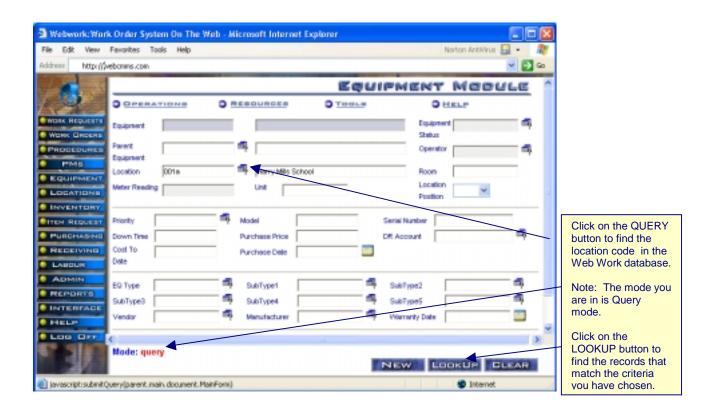
Comparison operators such as: <, >, null, not null and % - wild card can be used to further define a guery. See System Overview – Query By Example for more information.

9.1.2. Equipment Queries - Example 1

In this example we are going to do a query to find records for equipment located in Harry Mills School.

- Enter the Equipment module Equipment by selecting it from the menu on the left hand side of the Web Work screen.
- Click on the PERATIONE menu while in the Equipment module to display the drop down menu.
- Select Equipment Query from the drop down menu.
- Enter the code for Harry Mills School into the location field or click on the QUERY button to find the code in the Web Work database.

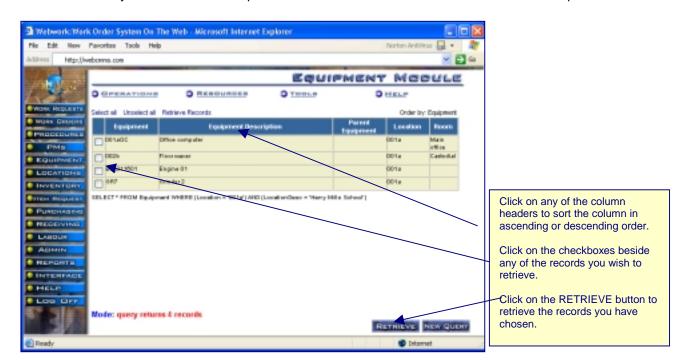




Click on the LOOK UP button
 LDOKUP at the bottom of the screen.



If you know you want to retrieve ALL the equipment records associated with this location, instead of clicking on the LOOKUP button, you can just press the enter key on your keyboard. All equipment records for Harry Mills will be opened.



When you click on the lookup button a screen similar to the one shown below will open:

- To sort the columns in ascending or descending order, click on the column header.
- Click the checkbox beside any of the records you want to open or click on Select All to open all the records.
- Click on the RETRIEVE button RETRIEVE at the bottom of the screen to open the records you have selected.

If you selected multiple records, arrows will appear on the bottom left hand side of the screen.

Use these arrows to move from one record to the next. Next

10.1 Equipment – PM List

The PM List feature is used to view the PMs associated with a piece of equipement.

To view PMs associated with an equipment record:

- Click on the EQUIPMENT button on the left hand side of the screen to access the Equipment module.
- Open an Equipment Record.

• Click on the SESSURGES menu at the top of the screen and select PM List from the drop down menu.



The following screen will open:



The table shows the Preventive Maintenance Work Orders for this equipment record.

- If you wish to view or change a PM, click on a PM # or Description. This will open the Preventive Maintenance module of the Web Work System with the PM you choose open in edit mode.
- To exit this screen and return to the Equipment record, click on the CANCEL button or click on the Second menu and select Equipment from the drop down menu.



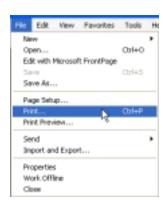
If you want to add a PM to the list displayed you must go to the PM module to create the PM record for the applicable piece of equipment.

11.1 Printing Equipment Records

There are two ways to print equipment records. You can print an individual equipment record or multiple equipment records that you have selected and retrieved.

11.1.1. To print only the equipment record that is open on the screen:

- Click on the PRINT button PRINT at the bottom right hand side of the screen.
- The selected record will open in a new browser window.
- Click on File and select Print from the drop down menu to proceed with printing.



11.1.2. Printing Multiple Equipment Records

To print a batch of equipment records:

- Perform an equipment query to open the desired equipment records. See Equipment Queries for more information on performing equipment queries.
- Click on the Preserved menu and choose Print Selected Equipment from the drop down menu.



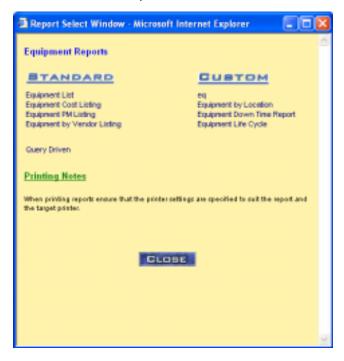
• The selected records will open in a new browser window. Click on File and select Print from the drop down menu to proceed with printing.

12.1 Equipment - Reports

To access Equipment reports click on the Transfer menu and select Reports from the drop down menu.



A screen similar to the one shown below will open:



Click on any of the Reports listed under Standard or Custom, to open them.



Only reports applicable to the Equipment module will be displayed. To view all reports, click on the REPORTS module button on the left hand side of the Web Work screen. For more information about reports, see the Reports section of this manual.

12.1.1. Creating Equipment Reports

Reports cannot be created in the Equipment module. To create equipment reports click on the REPORTS module button REPORTS to access the report writer and create the report.

12.1.2. Printing Equipment Reports

Equipment reports can be printed from the Equipment module or from the Reports module.

To print a report in the Equipment module:

- Open the Equipment module.
- Click on the Transfer menu and select reports from the drop down menu.
- Select the report you wish to print by clicking on its title.

The report will open in Preview mode.

• Click on File and select Print from the drop down menu to print the report.

13.1 Links

When you are in the Equipment module and select Links from the Tooler menu, the Web Work Create/Edit Links window will open as shown below. You can view existing links or create new links using this feature.





You can only view links, which have been setup to be accessible from this module or from all modules. Links set up in other modules with the accessibility set as only within that module will not be shown.

For information on creating New links see the Links section of this manual.